

Braşov 2034

PUBLIC SUMMARY · PUBLIC CONSULTATION · 2026

OMD BRAŞOV · 2026

Tourism Development and Marketing Strategy of the Braşov Destination 2027–2034

Public summary · version for public consultation

BENEFICIARY

Braşov Destination Management Organisation
Association (OMD Braşov)

PROJECT TEAM

BrandBerry srl (lead partner) · Horwath HTL
România · GMP CommUnity



A destination that grew in volume and wants to grow in value

In two decades Braşov has become Romania's most visited historic mountain city: arrivals have almost quadrupled since 2001, winter is a full season rather than a peak of a few weeks, and the city's image is the strongest of all the destinations tested in the national survey. The data also show the other side: each visitor stays for a shorter time, the occupancy rate of accommodation is now below that of 2001, and the historic centre, Tâmpa and Poiana Braşov feel the pressure on the same days and at the same hours.

The Tourism Development and Marketing Strategy for the Braşov Destination 2027–2034 starts from this finding. It does not aim at more tourists at any price, but at more value from every visit: longer stays, a whole year in use, neighbourhoods, resort and region included, and a city that remains, above all, its residents' own.

This magazine summarises the Final report as submitted to public consultation. Each page points to the full document, and the last page shows how to send comments. The strategy will change after the consultation; this is the working version, not the adopted document.



Stage I consultation: twelve workshops with operators, institutions, associations and residents, June–July 2026.

CONTENTS

Braşov today	3
What the data say	4
Twelve key challenges	5
Three scenarios to 2034; the strategy chooses growth in value	6
The direction	7
Vision and positioning	8
How the strategy is built	9
Five strategic objectives, with 2034 targets	10
The policies	12
Mobility and the historic centre	12
Nature in four seasons and active tourism	13
Poiana Braşov, a premium resort	14
Gastronomy	15
Culture and the living city	16
Business tourism and the exhibition centre	17
Accommodation and tourist apartments	18
Six horizontal policies link the policies together	19
Implementation	20
Milestones 2027–2034	21
How success is measured	22
Public consultation	24

Brașov attracts more visitors, but each one stays for less time

715,064

arrivals in classified accommodation, 2025

third county in Romania, after Bucharest and Constanța

1.84

nights, average length of stay, 2025

down from 2.62 nights in 2001

33.2%

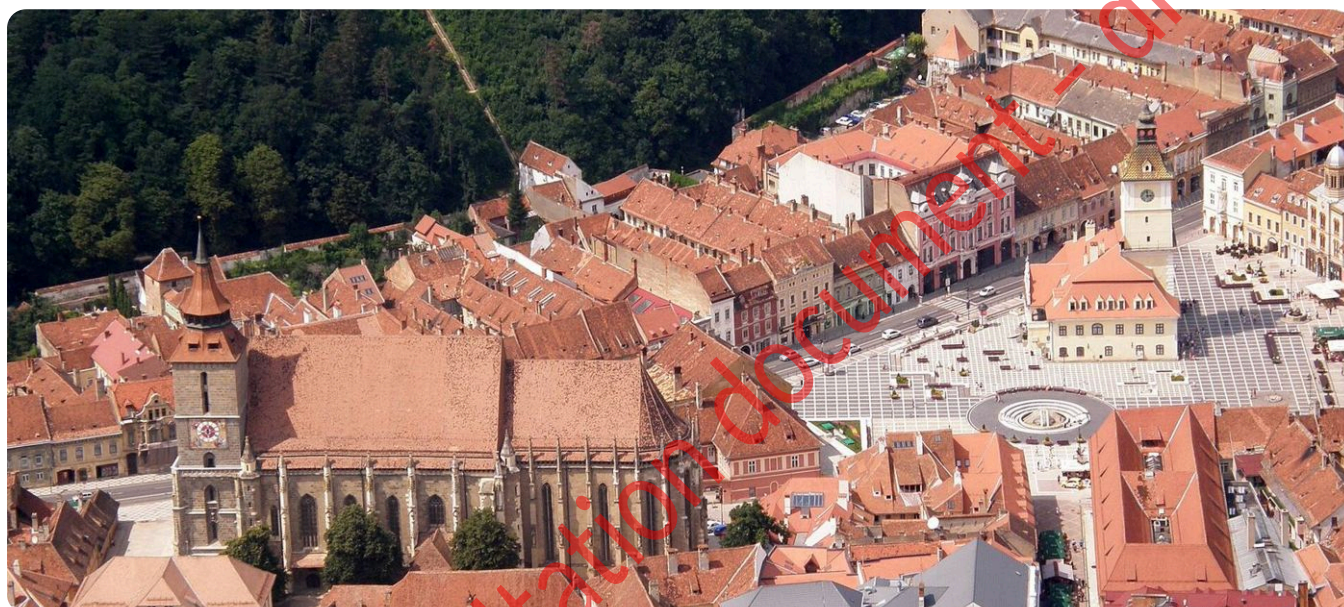
occupancy rate, 2025

below the 2001 level (33.7%): bed capacity grew as fast as demand

86.9%

of Romanian travellers find Brașov attractive

the strongest image among the 15 destinations tested



Source: National Institute of Statistics; the project's national survey. Figures are those of the Final report.

What the data say

A strong but narrow image

The spontaneous image is dominated by the mountains (29.1%), the Black Church (19.1%) and Poiana Brașov (14.0%). Gastronomy (4.9%) and events (2.3%) are almost absent.

Official statistics see only part of tourism

The destination receives about 2.7 million visits a year, 60% of them without an overnight stay; official statistics cover about a quarter of them. Around 2,295 short-term rental listings are active on platforms, against roughly 1,100 classification certificates.

Integrated diagnosis: 2.54 out of 5

The strengths are resources and image: nature, heritage, positioning, accommodation capacity. The weaknesses are conversion and operation: the value of demand, capacity use, mobility (1.95), the apartment regime, data and coordination.

What the city says

22

interviews, 24
participants

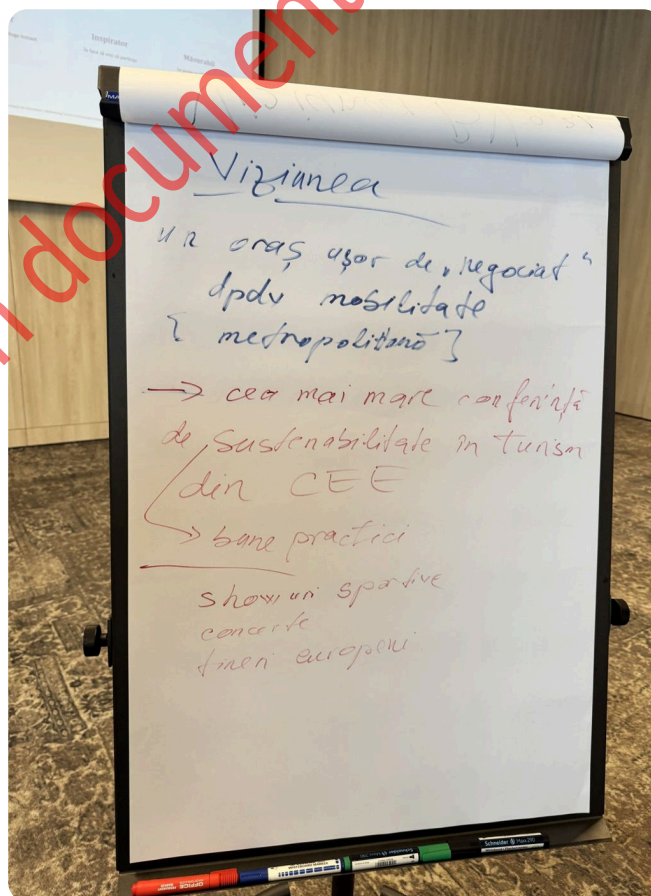
12

group
consultations

148

themes
identified

- Nature is the most frequently named asset: 21 interviews and 9 workshops.
- Weak governance is the main problem (15 interviews, 10 workshops), followed by traffic and parking (14 interviews, 10 workshops).
- A destination management organisation working as a platform and a link is proposed in all 12 workshops.
- Seven of the nine problems named in at least half of the interviews had already been formulated in 2018. The strategy therefore puts its emphasis on implementation and governance.



The vision written by participants at one of the workshops.

Twelve key challenges

PR1 Low value of demand

PR2 Unused capacity in the off-season and on weekdays

PR3 Mobility and access to the centre and to Poiana

PR4 A historic centre under pressure

PR5 Poiana: the gap between season and off-season, the public space

PR6 Unequal rules on the accommodation market

PR7 Business tourism without infrastructure

PR8 Heritage seen as scenery, little-known events

PR9 Gastronomy not spontaneously associated with Brașov

PR10 Nature under pressure: Tâmpa, wildlife, safety

PR11 Fragmented governance and insufficient data

PR12 People and skills



Sport in the city: the start of a mountain marathon in Șchei.

Three scenarios to 2034; the strategy chooses growth in value

	2025	A. BUSINESS AS USUAL	B. GROWTH IN VOLUME	C. GROWTH IN VALUE
Registered arrivals (thousands)	715	769	1,430	900
Length of stay (nights)	1.84	1.74	1.74	2.20
Overnight stays (millions)	1.32	1.34	2.49	1.98
Occupancy rate	33.2%	28.3%	33.2%	41.7%

Project team calculation on official statistical series; 2034 values are estimates.

WHY GROWTH IN VALUE

- The only scenario that raises occupancy and the return on existing capacity.
- Growth comes from the off-season, weekdays, the neighbourhoods, Poiana and the region, not from the peaks that are already crowded.
- The number of tourists grows sustainably (1% a year), and a third of those who today stay outside the records become customers of licensed accommodation: 900,000 registered arrivals in 2034, against 715,000 in 2025. Growth in volume would double arrivals and the stock of beds, with no gain in occupancy.



AMBITION 2034

By 2034, Braşov becomes the destination in Romania where tourism creates the most value for the city and its residents: a place where visitors choose to stay several days, in any season, and where the people of Braşov want them to come back.

The 2034 ambition and the purpose of the strategy

PURPOSE

Increasing the value that tourism brings to Braşov and its residents: a significant increase in the number of customers of licensed businesses that meet the city's quality criteria, and a sustainable increase in the number of tourists, within the carrying capacity of the city, the resort and the surrounding nature.

TWO HEADLINE KPIS, REPORTED TOGETHER

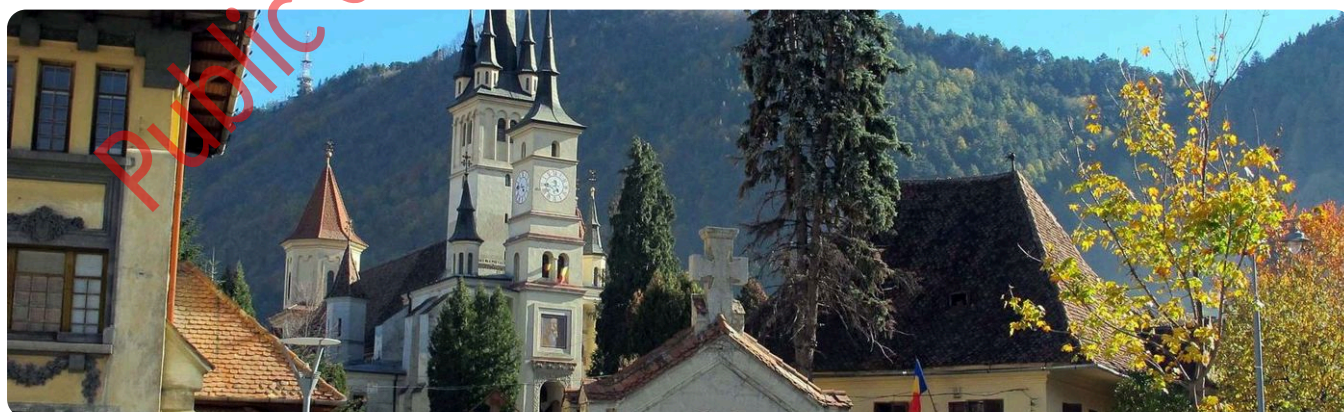
Residents' acceptance of tourism

measured every two years from 2027; never below the 2027 level

Visitor satisfaction

firm recommendation rises from 76.7% to at least 80%

Growth counts as a success only if both stay high while the value per visitor rises.



THE DIRECTION

Vision and positioning

VISION 2034

In 2034, Braşov is Romania's historic mountain city. Nature begins in the old town, and Poiana Braşov and the Carpathians are reachable without a car, in any season. Visitors stay several days, and the people of Braşov support tourism because they see its benefits: a clean, coherent and inhabited centre, neighbourhoods with a life of their own, nature close to home. Braşov is an international destination: it does not compete with any destination in Romania, but measures itself against the urban and mountain destinations of Central and Western Europe, with Vienna as its aspirational benchmark for quality of life.



PROPOSED POSITIONING, SUBMITTED TO PUBLIC CONSULTATION

“Braşov is the historic mountain CITY of Transylvania: an old border market town, inhabited and alive, from which nature, Poiana Braşov and the region are easily reachable, in any season.”

The promise: the historic city and the mountain on the same day. The differentiation: the combination of historic city, mountain, resort and region, which no comparable destination has.

THE DIRECTION

How the strategy is built

1

12 key challenges

PR1–PR12, from official data, the national survey, reviews, the integrated diagnosis and the consultation

2

Vision · Mission · Positioning

the direction of the destination

3

Ambition 2034 and Purpose

two headline KPIs: residents' acceptance, visitor satisfaction

4

5 strategic objectives

value · all year, whole territory · residents · visitors · partnership, data, nature

5

21 development objectives

each with an indicator, a baseline and targets for 2030 and 2034

6

7 key policies + 6 horizontal policies

mobility and centre · nature · Poiana · gastronomy · culture · business · accommodation; marketing plan

7

325 measures, 88 key measures

Annex 1, the 2027–2034 implementation plan, with owner, horizon and priority

8

Implementation, monitoring, evaluation

destination observatory; mid-term evaluation in 2030; final evaluation in 2034



THE DIRECTION

Five strategic objectives, with 2034 targets

OS1 More value from every visitor

stay of at least 2.2 nights; revenue per available room up by at least 25% in real terms; at least 900,000 arrivals in licensed accommodation in 2034

OS2 A destination used all year and across its whole territory

occupancy of at least 40%; spring with at least 23% of overnight stays; winter with at most 35% of apartment revenue in Poiana

OS3 Tourism accepted and supported by residents

the acceptance index never below the 2027 level; the historic centre stays inhabited; tourism's contribution to the local economy is measured

OS4 Visitors satisfied with a quality experience

recommendation of at least 80%; review score of at least 4.50

OS5 A destination managed in partnership, on data, with a controlled impact on nature

the DMO mandate agreement; 12 key data series; the revised Tâmpa plan; operators report water, energy and local products

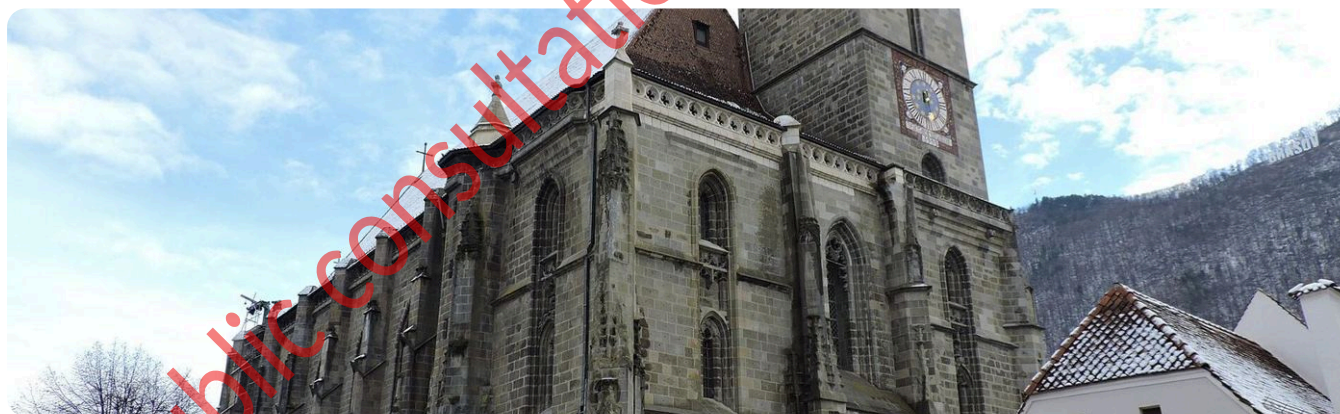


THE DIRECTION

Each policy serves several objectives

	OS1 VALUE	OS2 ALL YEAR, WHOLE TERRITORY	OS3 RESIDENTS	OS4 VISITORS	OS5 PARTNERSHIP, DATA, NATURE
1 Mobility and the historic centre	●	●	●	●	●
2 Nature and active tourism	●	●	●	●	●
3 Poiana Braşov	●	●	●	●	●
4 Gastronomy	●	●	●	●	○
5 Culture and the living city	●	●	●	●	○
6 Business tourism	●	●	●	●	○
7 Accommodation	●	●	●	●	●
S1 Longer stays	●	●	○	●	○
S2 Destination calendar	●	●	●	●	○
S3 The DMO as a link	●	○	●	○	●
S4 Information, digital, data	○	●	○	●	●
S5 Identity and brand	●	○	●	●	○
S6 People and skills	●	○	○	●	●

● main contribution
 ● secondary contribution



POLICY 1

Mobility and the historic centre

A centre explored on foot, with parking at its edge, and a Braşov from which the region is explored without a car. The rule: the alternative comes before any restriction.

KEY MEASURES

- The airport-city link: the express bus line, a regulated taxi rank and arrival information, by the summer season of 2027
- No free weekend parking in the historic centre; the Bartolomeu park-and-ride (697 spaces), with an integrated ticket and a shuttle to the centre
- Controlled weekend access only once the alternative works; five pedestrian corridors to Şchei, the parks and the Citadel
- The guest card: free public transport for the length of stay for legally accommodated tourists

WHAT THE CITY GAINS

Residents: a centre without parking-search traffic, a resident permit valid seven days a week, a 30 km/h limit in the centre and in Şchei.



POLICY 2

Nature in four seasons and active tourism

Nature becomes a resource that is accessible all year, protected and safe, from Tâmpa to the park forests and Postăvaru.

KEY MEASURES

- The Tâmpa management plan revised by 2029; a single trail map in 2028, with uniform information at trailheads
- Family cycling paths in the park forests: at least 25 km by 2034
- A twelve-month nature calendar, active-tourism products and communities
- Coexistence with bears, mountain safety and a climate vulnerability assessment of the destination (2028)

WHAT THE CITY GAINS

Residents: parks with lawns open for rest and play, nature close to home, safe and clean trails.



An old ski-run marker in the forests of Braşov.

POLICY 3

Poiana Braşov, a premium resort

The public space of Poiana reaches the standard of its services: a centre, common rules and reasons to visit in every season.

KEY MEASURES

- The zonal urban plan (2027) and the Resort Regulation (2028), with a compliance score for all businesses by 2031
- The zero zone: the new centre of the resort, with a design code and selected retailers
- Cooperation among operators: joint packages, the “Poiana celebrates the world” programme and a resort fund from the city tax
- Targets: winter falls from 45.9% to at most 35% of apartment revenue; off-season occupancy rises from 26.8% to at least 40%

WHAT THE CITY GAINS

Management stays with the City Hall, with a separate budget line; the operators’ association has an advisory role.



POLICY 4

Gastronomy

Gastronomy becomes a quality benchmark of the destination and links existing demand to the cuisine of Țara Bârsei.

KEY MEASURES

- The reference recipe book of Țara Bârsei and the signature dishes with a common sign: at least 50 venues in 2034
- The short supply chain of local products: at least 100 venues with a verified share of local products in 2034
- Enforcement of the Terrace Guide: contracted breakfast for apartment guests
- The destination quality label: at least 80 venues in 2034

WHAT THE CITY GAINS

Residents: a centre without kiosks and branded street furniture, producers' markets, neighbourhood squares alive in the evening.



A sign of tourism of another age: "Vederea frumoasă", a tradition since 1905.

POLICY 5

Culture and the living city

Heritage turns from scenery into story, and the city becomes a lively place in the evening, in the centre and in the neighbourhoods.

KEY MEASURES

- The Junii custom: the file for the national register of intangible heritage; the 2028 tercentenary as the anniversary year
- The cultural park of the historic centre: a uniform visual regime, adopted in a single decision
- A joint museum ticket, a single calendar published a year ahead, three neighbourhood cultural centres by 2030
- The bid for the European Capital of Culture 2034 title remains a decision of the Local Council

WHAT THE CITY GAINS

Residents: local history told correctly, including in schools; neighbourhoods with a life of their own; cultural participation measured every two years.



POLICY 6

Business tourism and the exhibition centre

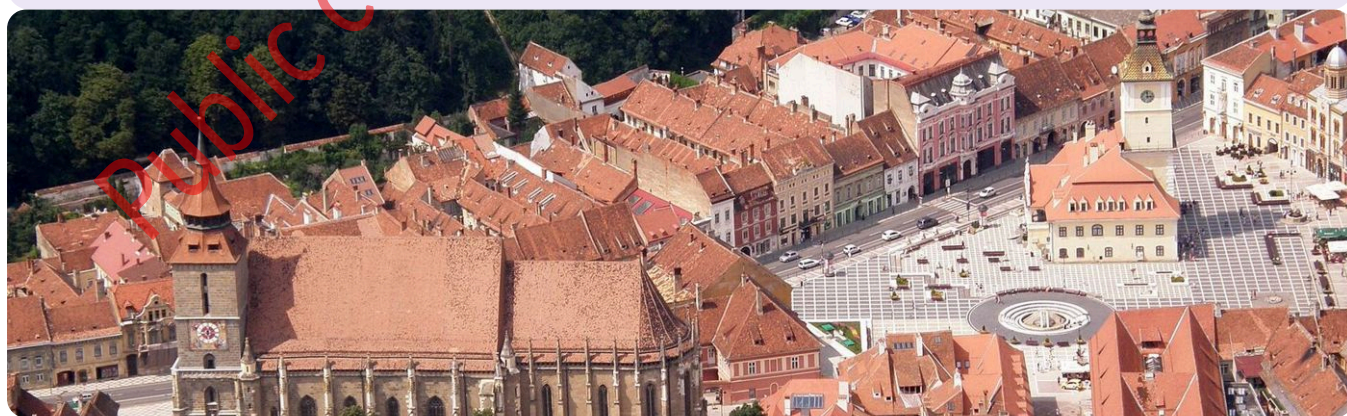
Business tourism fills the weekdays and the off-season, when capacity already exists.

KEY MEASURES

- A modular exhibition centre, with a first phase of about 50,000 sqm, after the 2027 feasibility and market study
- The site and access corridors reserved in planning documents (2027–2028)
- The DMO convention bureau attracts fairs and congresses; a conference product for weekdays
- Estimated potential of the first phase: about 500,000 overnight stays a year, equal to 38% of 2025 overnight stays (estimate)

WHAT THE CITY GAINS

The investment decision follows the study; the 2030 evaluation integrates the centre's effect into the targets.



POLICY 7

Accommodation and tourist apartments

The same rules and the same tax for all forms of accommodation; guidance through incentives, without bans.

KEY MEASURES

- The registration number in every listing, as required by EU law (Regulation (EU) 2024/1028)
- City tax collected through platforms, simple procedures and a local contact point for hosts
- No day caps and no limit on the number of licences; contracted breakfast links apartment guests to nearby venues
- Target: the ratio of active listings to classified units falls from about 2.1 to 1.05 in 2034

WHAT THE CITY GAINS

Licensed businesses win the customers whose demand now goes to unregistered rentals; operators report water and energy use and the share of local products.



THE POLICIES

Six horizontal policies link the policies together

S1

Longer stays

a product catalogue by length of stay; resort packages; Braşov as the base of the region

S2

The destination calendar

a single calendar, published a year ahead; the DMO as calendar authority

S3

The DMO as a link

the agreement between the City Hall and the DMO on destination functions; the uses of the city tax; an annual public report

S4

Integrated information, digital and data

the same information from booking to departure; the destination observatory, with 12 key data series and a public dashboard from 2028

S5

Identity without kitsch, and brand

visual order in the centre and in Poiana; the destination narrative; the city's story told through public space: street furniture and signage carry the symbols of each area

S6

People and skills

accredited guides and storytellers: at least 50 in 2034, in at least five languages; training programmes for hospitality



IMPLEMENTATION

What changes

For residents

- a historic centre without parking-search traffic, orderly and inhabited
- parks with open lawns; nature and Poiana reachable without a car
- the resident card and the “tourist in your own city” programme
- neighbourhoods alive in the evening, neighbourhood cultural centres
- acceptance of tourism measured every two years; the economic benefits of tourism measured and published

For businesses

- more customers for licensed businesses
- the same rules for all forms of accommodation
- a longer season: spring, November, weekdays
- the quality label, the recipe book, the signature dishes
- destination data: the hotel panel, the observatory, the dashboard

For visitors

- a predictable airport link and transport included for the length of stay
- the same information everywhere, in at least three languages
- a true story, told by accredited guides
- a Poiana with a centre, rules and reasons to visit all year
- safe trails, a single map, and the region as a day trip



Stage I consultation: twelve workshops with operators, institutions, associations and residents, June–July 2026.

IMPLEMENTATION

Milestones 2027–2034

2027	2028	2029	2030	2031	2034
the City Hall–DMO agreement; the uses of the city tax; the parking rules; the Poiana urban plan; the missing baselines measured	the Resort Regulation; the single trail map; the public dashboard; the European Capital of Culture bid	the revised Tâmpa plan	mid-term evaluation: results against interim targets	public trails uniformly marked; Poiana businesses compliant	final evaluation; the basis of the next strategy

Two thirds of the 325 measures start in 2027 or immediately; most are acts, agreements and programmes, not investments.



IMPLEMENTATION

How success is measured

FOUR SIGNS OF SUCCESS IN 2034

2.2

nights, average length of stay

40%

occupancy rate

≥ 2027

residents' acceptance of tourism

80%

firm recommendation of the destination

THE TOOLS

The destination observatory

12 key data series, from city-tax overnight stays to the visitor survey and the resident questionnaire; an annual public dashboard from 2028

The economic impact study

the estimated GDP of the municipality and the metropolitan area, the share of tourism and hospitality employment; in 2028, 2031 and 2034

Operators' sustainability reporting

water and energy use per overnight stay and the share of local products in purchases, by a common method, from 2028

Independent evaluations

the 2030 mid-term evaluation can adjust targets and measures; the ambition and the purpose stay unchanged until 2034

IMPLEMENTATION

Who is responsible, and with what resources

WHO IS RESPONSIBLE

Braşov City Hall

adopts the strategy and the local acts, holds 45% of the DMO votes and signs the destination-functions agreement (2027)

OMD Braşov (the DMO)

coordinates implementation, the calendar, information, gastronomy, culture and nature; publishes the annual report

Partners

the County Council, cultural institutions, the Kronstadt Forest Administration, RATBV, the university, the operators' associations

WITH WHAT RESOURCES

The city tax

7 lei per tourist and night for tourism promotion and 5 lei for mountain rescue, with uses set by council decision and an annual public report

Local and county budgets

public space, mobility, cultural institutions and museums, mountain rescue

European funds

the 2021–2027 programmes, eligible until the end of 2029, and the 2028–2034 framework

Partnerships

private investment in Poiana, in the exhibition centre and in accommodation; operators' contributions

Every local act is preceded by a legal assessment and public consultation. The strategy tracks 20 risks, with alarm signals and set responses.



How to take part

This presentation summarises the Final report of the strategy. The full document contains the diagnosis, the direction, the thirteen policies, the implementation plan (Annex 1, 325 measures) and the indicator sheets.

1. Read the summary or the full Final report on the consultation page.
2. Send comments through the online form.
3. Residents of Braşov and Poiana Braşov are also invited to fill in the residents' questionnaire.
4. Every comment receives a reasoned decision, published in the consultation report.

brandberry.ro/brasov2034

Comments and proposals are sent to OMD Braşov during the public consultation period. Every comment receives an answer in the consultation report.

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Working document, published for public consultation. It is not the final adopted document.